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(54) **Automatic (dynamic) network skill-based routing**

(57) In a network of call centers, each call center sends real-time call center management information to a network call center controller at a regular interval. An administrator can configure a routing preference for each network skillset. At a regular interval, the received real-time call center management information is evaluated by the network call center controller, based on the

administrator configured routing preferences, and updated routing tables are automatically determined for each network skillset. The updated routing tables are then sent by the network call center controller to each call center. Each call center then uses the updated routing tables to queue inbound calls to multiple remote call center servers as well as locally.

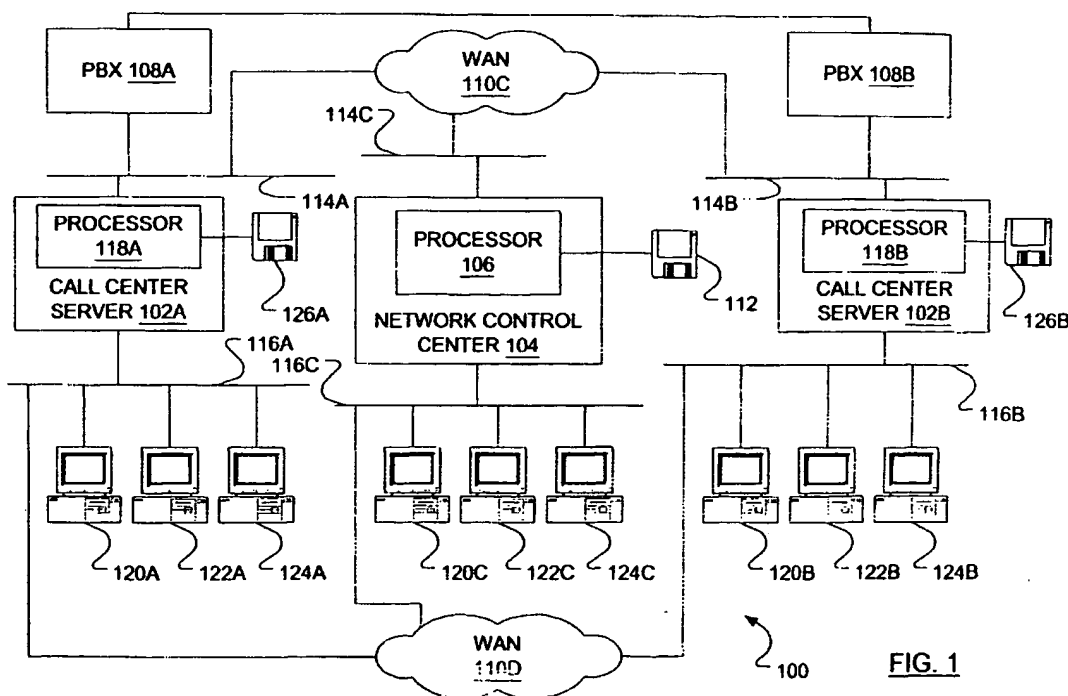


FIG. 1

Description

FIELD OF THE INVENTION

[0001] The present invention relates to routing calls in networked call centers and, more particularly, to automatic (dynamic), network skill-based routing.

BACKGROUND OF THE INVENTION

[0002] A call center is a common interface between a commercial interest and its customers. A toll-free telephone number is often provided to customers as a source of such services as product information and technical support. Agents are hired to receive incoming calls and provide the customers that call the toll-free telephone number with a service. Call centers may also be a source of outbound calls. Agents place calls which may, for instance, follow-up the provision of a service, announce new products or schedule a delivery.

[0003] Call centers are typically low margin, high volume operations, and even small improvements in efficiency can have significant effect on the commercial viability of a center. Historically, the call center has premises-based switching relying on a single-switch-to-single-network configuration. Customer requests enter via the public-switched telephone network (PSTN), usually via a Private Branch Exchange (PBX), such as a Meridian 1 (from Nortel Networks Corporation of Montreal, Canada), to an automatic call distributor (ACD) providing the control mechanism, such as the Symposium Call Center Server (from Nortel Networks Corporation of Montreal, Canada). An ACD is telecommunications software used in a digital computer that automatically answers calls, queues calls, distributes calls to agents, and plays delay announcements. U.S. Patent No. 4,451,705 discloses a known type of ACD and is incorporated herein by reference. When a call is received by the ACD it is assigned to a directory number (DN), or queue, for a particular agent or pool of agents. If all the agents assigned to that DN are busy, the call enters the DN queue and waits for one of the agents to take the call. The selection criteria for sending a call to a DN can be altered by supervisors to compensate for agents who are leaving at the end of a shift, competence of the agent, or any factor influencing the amount of time a caller must wait for an agent. An ACD may also provide detailed reporting to management on the performance of the agents and their tasks, reporting statistics and number of calls handled and the time spent in various stages of the call.

[0004] Interactive Voice Response (IVR) units may be connected to the ACD allowing additional information to be collected from a caller about the nature of the call and skills an agent may be required to have in order to properly service the call. The caller can be asked a series of questions, and the responses, either spoken or Dual Tone Multi-Frequency (DTMF) inputs from a key pad, can be used to provide additional information to the

ACD allowing the call to be routed to an agent who is suited to respond to the caller. Agents at a call center may perform a variety of duties and functions, many of which will require specialized training or knowledge to be performed effectively. In many instances, agents will have specific skill sets and are trained only to handle certain functions and are unable to assist callers with functions outside their knowledge base.

[0005] Agents with certain skills may be in high demand in one region, or during certain peak time periods and idle at another. As the use of call centers develops into an international business, special attention must be placed on cultural and linguistic demands of crossing borders. Cultural sensitivity as well as language fluency can not be expected of each and every call center employee for each and every potential client. Cultural sensitivity and language fluency as well as other skill sets must then be managed and built into call center design.

[0006] At a call center server, certain skills may be grouped into skillsets and the skillsets internally assigned an electronic identifier. The identifier may then be electronically assigned to an agent having the skills that define the skillset. Skill-Based Routing (SBR) allows call routing based on criteria such as service requirements of a call and the skills of available agents.

[0007] An Integrated Call Center Management system (ICCM) associated with an ACD allows SBR within a call center. When a call arrives at a call center server through mechanisms such as IVR or Automatic Number Identification (ANI), an ICCM can determine the agents in the skillset necessary to service the caller. If those agents are busy, or if that call center does not have an agent in the appropriate skillset, the call may be placed in a queue for the next available agent in the appropriate skillset or manually transferred to another call center in order to be assisted with an agent in the appropriate skillset.

[0008] Network Call Processing (NCP) is used to route calls seamlessly to qualified agents between call centers in a network. A large corporation may have multiple call centers at sites that are geographically dispersed but linked together in a network. In known systems, if a call center at site A did not have any available agents in the appropriate skillset, a call could be sent to a call center at site B via the ACD-DN where it would be queued the appropriate skillset. However, there was no guarantee the call center at site B would have an agent available in the appropriate skillset.

[0009] In U.S. Patent Application No. 09/078,066 filed date 13 May 1998 (the contents of which are incorporated herein by reference), many deficiencies of known systems are overcome. In the application, network skillsets are defined with a name and electronic identifier that relate the same skillset at each call center on the network. A network control center is introduced whereat a record of the status of each network skillset and call center may be maintained. A call may be queued to a network skillset at multiple call centers. When an agent

becomes available to answer the call at one of the call centers, the agent is reserved and the site transferring the call routes the call to the site with the reserved agent. Thus, before a call is transferred to the next call center, the system knows whether the caller can be helped at the next center. Calls are networked using a network automatic call distributor (NACD). To queue a call to a network skillset at multiple sites, a NACD consults a routing table. A routing table for a particular network skillset comprises a list of sites having agents in that particular network skillset, ranked according to a routing preference. Routing tables are defined for each skillset at each call center and the site rankings are configured and periodically updated by an administrator at a Network Control Center (NCC). These tables are relatively static. However, the routing tables may be updated in either a scheduled or adhoc manner. To provide good service to a caller, an administrator is required to monitor the system and make changes to the routing tables.

[0010] Routing tables are used to logically queue calls to multiple network skillsets that may be local or located at remote call centers. It is the responsibility of the call center to reserve an agent when an agent is available to answer the network call. Once a target call center at a particular call center reserves an agent, the call is routed to the target PBX where the call is presented to the reserved agent.

[0011] Shortcomings of systems employing administrator configured routing tables include a requirement for close monitoring of the system in order to make any necessary adjustments to the routing tables in a timely manner. Solutions exist wherein a control center may be used to manage a network of call center servers by retrieving real-time events and data from each call center and routing calls at the network level based on this information. However, network level routing solutions do not reserve agents. There is no guarantee that an agent will be available to answer the call when the call is sent.

SUMMARY OF THE INVENTION

[0012] Instead of a call center network administrator making manual changes or scheduled changes to routing tables, a system employing the present invention automatically changes routing tables based on call center management information. In a network of call centers, each call center sends call center management information to a network call center controller at a regular interval. An administrator can configure a routing preference for each network skillset. At a regular interval, the received call center management information is evaluated by the network call center controller, based on the administrator configured routing preferences, and updated routing tables are automatically determined for each network skillset. The updated routing tables are then sent, by the network call center controller, to each call center. Each call center then uses the updated routing tables to queue inbound calls to multiple

remote call center servers as well as locally.

[0013] In accordance with an aspect of the present invention there is provided a method of distributing routing tables to a plurality of call centers, each having one or more agents, the method including receiving, from one or more of the plurality of call centers, call center management information, determining, based on the management information, a routing table, the routing table providing information for routing calls requiring a network skillset to call centers having one or more agents associated with the network skillset and communicating the routing table to the plurality of call centers. In another aspect of the present invention a controller is provided to carry out this method. In a further aspect of the present invention a computer software media product permits a general purpose computer to carry out the method.

[0014] In accordance with another aspect of the present invention there is provided a communications network including a plurality of call centers, each having one or more agents associated with a network skillset, a controller for automatically distributing a routing table providing information for routing calls requiring a network skillset to the call centers and a router for routing, based on the routing table, a call, requiring the network skillset, received at one of the call centers to an available agent associated with the network skillset at one of the call centers.

[0015] In accordance with a further aspect of the present invention there is provided a method of updating routing tables at a call center, the method including sending, to a controller of a plurality of call centers, call center management information and receiving, from the controller, a dynamic routing table that provides information for routing calls requiring a network skillset, the dynamic routing table determined based, in part, on the management information. In another aspect of the present invention a call center is provided to carry out this method. In a further aspect of the present invention a computer software media product permits a general purpose computer to carry out the method.

[0016] Other aspects and features of the present invention will become apparent to those ordinarily skilled in the art upon review of the following description of specific embodiments of the invention in conjunction with the accompanying figures.

BRIEF DESCRIPTION OF THE DRAWINGS

[0017] In the figures which illustrate example embodiments of this invention:

FIG. 1 schematically illustrates a configuration of a network of call centers including a network control center in accordance with an embodiment of the present invention; and

FIG. 2 illustrates, in a flow diagram, routing table

distribution steps followed by a network control center in accordance with an embodiment of the present invention.

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENTS

[0018] FIG. 1 illustrates a networked system of call centers 100, where the call centers are distributed at separate sites. A Site "A" comprises a call center server (CCS) 102A connected via an embedded local area network (ELAN) 114A to a communication routing system, such as a Private Branch Exchange (PBX) 108A, for routing communications. It will be appreciated that there are alternative means for routing communications, such as over a local area network or the Internet, which will provide this function as well. CCS 102A is also connected to a number of supervisor and administrator workstations 120A, 122A, 124A via a customer LAN (CLAN) 116A. A Site "B" comprises a CCS 102B connected via an ELAN 114B to a PBX 108B. CCS 102B is also connected to a number of supervisor and administrator workstations 120B, 122B, 124B via a CLAN 116B. A network control center (NCC) 104 is at an NCC site and is connected to an ELAN 114C which is networked with ELAN 114A and ELAN 114B via a wide area network (WAN) 110C. Similarly, a CLAN 116C to which NCC 104 is connected is networked with CLAN 116A and CLAN 116B via WAN 110D. Connected to CLAN 116C are administrator workstations 120C, 122C, and 124C. Any means of data communication between CCS 102A and CCS 102B, including the public switched telephone network (PSTN), is acceptable, however, the preferred embodiment is via a high speed digital data network such as WAN 110C based on ISDN or equivalent architecture. NCC 104 includes a processor 106 loaded with automatic network skill-based routing software for executing a method of this invention from software medium 112. Call center servers 102 and 102B include processors 118A and 118B loaded with routing table updating software for executing a method of this invention from software medium 126A and 126B, respectively. Software media 112, 126A and 126B may be disk, tape, chip or random access memory containing a file downloaded from a remote source.

[0019] Turning to FIG. 2, in overview, each CCS 102A, 102B sends to NCC 104 call center management information (for instance, real-time skillset statistics) at a regular interval. An administrator, at NCC 104, can configure routing preferences for each network skillset. At a regular interval, the real-time skillset statistics are received (step 202), and evaluated (step 204) by NCC 104, based on the administrator configured routing preferences. Updated dynamic routing tables are then automatically determined (step 206) for each network skillset. The updated dynamic routing tables are subsequently distributed (step 208) by NCC 104 to each CCS 102A, 102B. Each CCS 102A, 102B uses the updated

dynamic routing tables to queue inbound calls to multiple remote call center servers as well as locally.

[0020] In a preferred embodiment of the present invention, each call that is queued to a network skillset is logically queued to a network skillset at the three most optimal call centers. That is to say that a preferred dynamic routing table comprises three sites ranked as most optimal given received statistics. It has been determined that the likelihood that a call is answered in a queue beyond the third queue to which a call is logically queued is insignificant. However, the number of call centers to which to queue a call may be configurable by an administrator of a particular call center.

[0021] The rate at which call center management information (for instance, real-time skillset statistics) for network skillsets is sent to NCC 104 from each site is configurable at NCC 104. The rate at which NCC 104 is updated with real-time statistics affects the determination of dynamic routing tables (discussed hereinafter). An administrator may select an update rate of every five seconds for the statistics from each CCS for dynamic routing table determination. The update rate selected for receipt of statistics from each CCS for dynamic routing table determination is also the rate at which the dynamic routing tables are sent to each site.

[0022] Update rates may be changed at any time. If the update rate of the statistics being sent to a NCC from each CCS is changed, then each site is informed of the change and the statistics are sent by each CCS at the new update rate.

[0023] One factor that affects the determination of dynamic routing tables is the state of a network skillset, where a state might be "on-line" or "off-line". An off-line state may be due to an out-of-service mode or a transitional mode. Another factor is the state of a "filter timer" for a particular site, which may be set due to problems sending calls to that site. Further, the routing preferences configured for each network skillset affect the determination. As well, dynamic routing table determination may be affected by the real-time network skillset statistics received by NCC 104.

[0024] If there are agents available for a network skillset, then routing preferences used in the determination of a dynamic routing table relating to a particular network skillset may include "Number Of Idle Agents"; "Longest Agent Idle Time Since Last Call"; and "Longest Agent Idle Time Since Login". Note that each network skillset may be configured differently for each call center. If the greatest "Number of Idle Agents" is chosen as a routing preference for a network skillset, then the sites are ranked by the number of idle agents. If "Longest Agent Idle Time Since Last Call" is chosen as a routing preference for a network skillset, then the sites are ranked by the longest agent idle time (since their last call). If "Longest Agent Idle Time Since Login" is chosen as a routing preference for a network skillset, then the sites are ranked by the longest agent idle time (since login). As will be apparent to a person skilled in the art, the

administrator may configure a formula which combines various routing preferences (such as "Number Of Idle Agents", "Longest Agent Idle Time Since Last Call", "Longest Agent Idle Time Since Login", etc.). The formula may assign different weights to individual routing preferences. After the sites (call centers) are ranked, a pre-set number of the top ranked sites may be assigned, in ranked order, to the dynamic routing table for the network skillset of interest. Consistent with the earlier example, no more than three sites would be included in this ranked list of sites. Alternatively, a ranked list of all call centers in the network may be sent to each call center and the number of sites to maintain in a routing table may be configured for each network skillset at each call center.

[0025] If there are no agents available for a network skillset, then an "Expected Wait Time" routing preference may be used in the determination of a dynamic routing table relating to a network skillset. The sites are ranked by the expected wait time in ascending order for the network skillset. After the sites are ranked, a pre-set number of the top ranked sites are assigned, in ranked order, to the dynamic routing table for the network skillset of interest.

[0026] If agents are available at fewer than a pre-set number of (say, three) sites, then the "Number Of Available Agents" routing preference may be used for the sites that have agents available and the remaining sites may be ranked with the routing preference chosen for no available agents (expected wait time). After the sites are ranked, a pre-set number of the top ranked sites are assigned, in ranked order, to the dynamic routing table for the network skillset of interest. Note that one administrator configured formula may be used to assess those sites with available agents and another formula used for those sites without available agents.

[0027] Turning to FIG. 1, call center site A receives notification of an incoming call and a particular network skillset identifier, such as "sales". Call center server 102A retrieves, from memory, the routing table for the "sales" network skillset and logically queues the call at all sites in the routing table utilizing WAN 110C to send queuing information to other call center servers. At one of the call centers in the routing table, an agent in the appropriate skillset is determined to be available and that availability is communicated to call center server 102A. The call is then sent to the call center with the available agent in the "sales" network skillset where it arrives and is answered by the agent. The site at which the call has arrived sends a message to call center server 102A indicating that the call has arrived. Call center server 102A then sends a message to each remaining site in the routing table to de-queue the call.

[0028] Alternatively, the site ranked first in the retrieved routing table is queried, by call center server 102A, for an available agent in the "sales" network skillset. If all the agents with the "sales" network skillset identification are busy at the site ranked first, call center

server 102A attempts to route the call to the site ranked second. If a response from the site ranked second reveals there are no available agents, the site ranked third is queried next. Assuming a routing table size of three, the series can be repeated until an agent at one of the three sites becomes available. Alternatively, the caller may be directed to another agent or asked to leave a voice mail message.

[0029] It is preferred that, once a call is transferred to another call center, an agent with the appropriate network skillset be available to receive the call when it arrives at the receiving call center. An agent reservation system, such as disclosed in U.S. Patent Application No. 09/078,066, may be used to ensure this availability. In such a system, a sending call center server (say, 102A in FIG. 1) sends a message to a call center server (say, 102B in FIG. 1) at a site in the routing table appropriate to the network skillset required for the call. The message requests an agent, assigned with the network skillset identification X, to be assigned to a call with a particular identification number Y. Call center server 102B determines if an agent with network skillset X is available. If such an agent is available, agent T is reserved for call Y, call center server 102A is informed that agent T has been reserved for call Y, an agent reserve timer is started, and, if the time reaches a preset value without receiving the call from call center server 102A, agent T is unreserved. If no agent is available, call Y may be sent to a network skillset queue to await an available agent. If no agent is available at call center server 102B, call center server 102A would normally query the next call center on its routing table to determine if there is an agent with the appropriate network skillset available. However, if there are no network skillset agents available at the other centers, such as if they have closed for the night, or no agents with the appropriate network skillset are logged into the system, the call may be placed in separate queue at each of multiple sites, where each of the multiple sites has at least one agent with the appropriate network skillset, but none currently available.

[0030] During the configuration of each network skillset, an administrator can choose between using the aforescribed dynamic routing tables (Dynamic Routing) and using a pre-configured static routing table (Table Routing). Even if Dynamic Routing is chosen, static routing tables are required to be pre-configured, primarily for backup purposes and to break ties in the statistics. For example, a routing preference for greatest "Number of Idle Agents" may be chosen and, at the time of a call routing decision, two sites may have the same "Number Of Idle Agents". In this case, the target site with the highest ranking in a pre-configured static routing table may be called the "best site" to which to route the call. The administrator may pre-configure static routing tables by ranking the sites in terms of the number of hops a call must make in order to go from the source site to the target site. Using these ranking criteria, the

target site for which an associated route, from the source site, has the fewest number of hops is ranked highest and the target site for which an associated route, from the source site, has the greatest number of hops is ranked lowest. This minimizes the number of trunks used to network a call.

[0031] A "Stale Data Timer" may be used to determine whether a current set of data received from another site is current enough to use. There may be a "Stale Data Timer" at NCC 104 and at CCS 102A, 102B. The CCS Stale Data Timer may be used to determine whether the dynamic routing table is too old to be used. More particularly, each CCS site requests dynamic routing tables from the NCC. If the network is slow or the NCC is slow, then the updates of dynamic routing tables may not be received by the CCS in a reasonable amount of time. Consider an example wherein the update rate for a dynamic routing table for a particular network skillset is configured to be six per minute (every ten seconds) and the last update of the dynamic routing table was 35 seconds ago. If the stale data timer is set to 30 seconds, then, instead of using the dynamic routing table, a pre-configured static routing table may be used to network calls, as the dynamic routing table is too old to use. The NCC Stale Data Timer may be used to determine whether the real-time statistics received from a particular CCS are too old, in which case, the particular CCS may be excluded from a dynamic routing table.

[0032] In a preferred embodiment of the present invention, the range of values for the "Stale Data Timer" is 10 to 240 seconds.

[0033] Other modifications will be apparent to those skilled in the art and, therefore, the invention is defined in the claims.

Claims

1. A method of distributing routing tables to a plurality of call centers, each having one or more agents, said method comprising:

receiving, from one or more of said plurality of call centers, call center management information;

determining, based on said management information, a routing table, said routing table providing information for routing calls requiring a network skillset to call centers having one or more agents associated with said network skillset; and

communicating said routing table to said plurality of call centers.

2. The method of claim 1 wherein said determining is based on a routing preference, which is affected by

said management information.

3. The method of claim 2 wherein said determining ranks call centers having network skillset agents in an order of priority for routing calls and assigns call centers to said routing table in ranked order.

4. The method of claim 3 wherein said assigning comprises assigning only a pre-set number of most optimal call centers, based on said ranking, to said routing table in ranked order.

5. The method of claim 3 wherein said determining further comprises:

determining an age of said management information last received from a given call center; and

excluding said given call center from said routing table if said age exceeds a maximum.

6. The method of claim 1 wherein one element of said management information, from one said call center, comprises a number of agents at said call center assigned to said network skillset which are idle.

7. The method of claim 1 wherein one element of said management information, from one said call center, comprises a measure of time since a last call for an idle one of said agents associated with said network skillset at said one said call center, where said measure of time is longer for said idle one of said agents than for any other idle agent among said agents associated with said network skillset at said one said call center.

8. The method of claim 1 wherein one element of said management information, from one said call center, comprises a measure of time since login for an idle one of said agents associated with said network skillset at said one said call center, where said measure of time is longer for said idle one of said agents than for any other idle agent among said agents associated with said network skillset at said one said call center.

9. The method of claim 1 wherein one element of said management information, from one said call center at which all said agents associated with said network skillset are busy, comprises an estimate of a measure of time before one said agent associated with said network skillset becomes available to answer a particular call.

10. A controller of a plurality of call centers, each having one or more agents, said controller comprising:

means for receiving, from one or more of said plurality of call centers, call center management information;

means for determining, based on said management information, a routing table, said routing table providing information for routing calls requiring a network skillset to call centers having one or more agents associated with said network skillset; and

means for communicating said routing table to said plurality of call centers.

11. A controller of a plurality of call centers, each having one or more agents, said controller comprising:

a receiver for receiving, from one or more of said plurality of call centers, call center management information;

a processor for determining, based on said management information, a routing table, said routing table providing information for routing calls requiring a network skillset to call centers having one or more agents associated with said network skillset; and

a network interface for communicating said routing table to said plurality of call centers.

12. A controller of a plurality of call centers, each having one or more agents, said controller operable to:

receive, from one or more of said plurality of call centers, call center management information;

determine, based on said management information, a routing table, said routing table providing information for routing calls requiring a network skillset to call centers having one or more agents associated with said network skillset; and

communicate said routing table to said plurality of call centers.

13. A computer readable medium for providing program control for a processor in a controller of a plurality of call centers, each having one or more agents, said controller for distributing routing tables to said call centers, said computer readable medium adapting said controller to be operable to:

receive, from one or more of said plurality of call centers, call center management information;

determine, based on said management information, a routing table, said routing table providing information for routing calls requiring a network skillset to call centers having one or more agents associated with said network skillset; and

communicate said routing table to said plurality of call centers.

14. A communications network comprising:

a plurality of call centers, each having one or more agents associated with a network skillset;

a controller for automatically distributing a routing table providing information for routing calls requiring said network skillset to said call centers; and

a router for routing, based on said routing table, a call, requiring said network skillset, received at one of said call centers to an available agent associated with said network skillset at one of said call centers.

15. A method of updating routing tables at a call center, said method comprising:

sending, to a controller of a plurality of call centers, call center management information; and

receiving, from said controller, a dynamic routing table that provides information for routing calls requiring a network skillset, said dynamic routing table determined based, in part, on said management information.

16. The method of claim 15 further comprising routing an incoming call requiring said network skillset to a call center based on said dynamic routing table.

17. The method of claim 15 further comprising receiving, from said controller, a static routing table that provides information for routing calls requiring said network skillset.

18. The method of claim 17 further comprising:

determining an age of said dynamic routing table; and

if said age exceeds a maximum, basing said routing on said static routing table.

19. The method of claim 17 wherein said routing is configured to be based on said static routing table.

20. A call center in a network of call centers, said network including a controller of said call centers, said call center comprising:

means for sending, to said controller, call center management information; and 5

means for receiving, from said controller, a dynamic routing table that provides information for routing calls requiring a network skillset, said dynamic routing table determined based, in part, on said management information. 10

21. A call center in a network of call centers, said network including a controller of said call centers, said call center comprising a network interface for: 15

sending, to said controller, call center management information; and 20

receiving, from said controller, a dynamic routing table that provides information for routing calls requiring a network skillset, said dynamic routing table determined based, in part, on said management information. 25

22. A call center in a network of call centers, said network including a controller of said call centers, said call center operable to: 30

send, to said controller, call center management information; and

receive, from said controller, a dynamic routing table that provides information for routing calls requiring a network skillset, said dynamic routing table determined based, in part, on said management information. 35

23. A computer readable medium for providing program control for a processor in a call center in a network of call centers, said network including a controller of said call centers, said computer readable medium adapting said call center to be operable to: 40

send, to said controller, call center management information; and 45

receive, from said controller, a dynamic routing table that provides information for routing calls requiring a network skillset, said dynamic routing table determined based, in part, on said management information. 50

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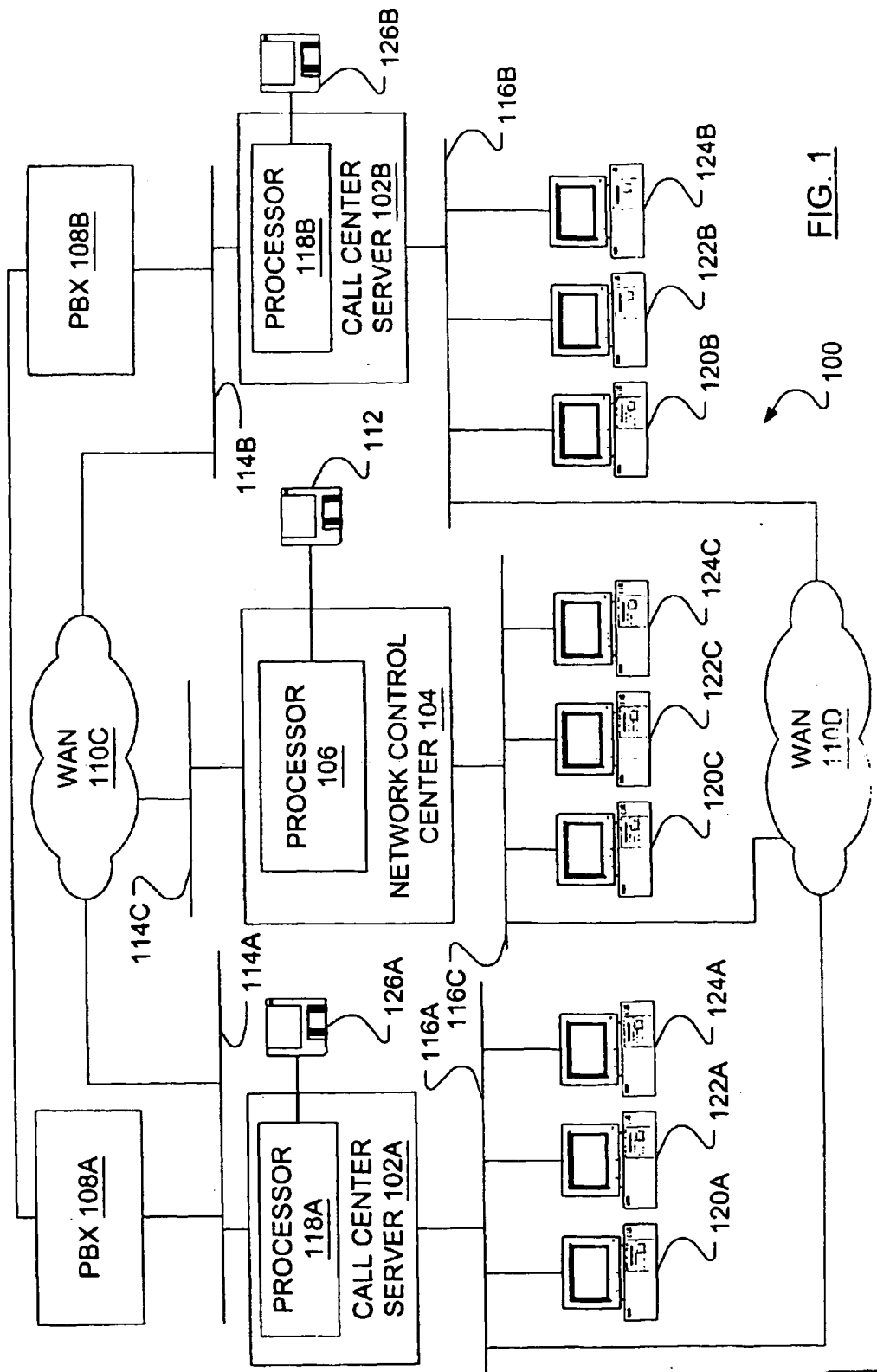


FIG. 1

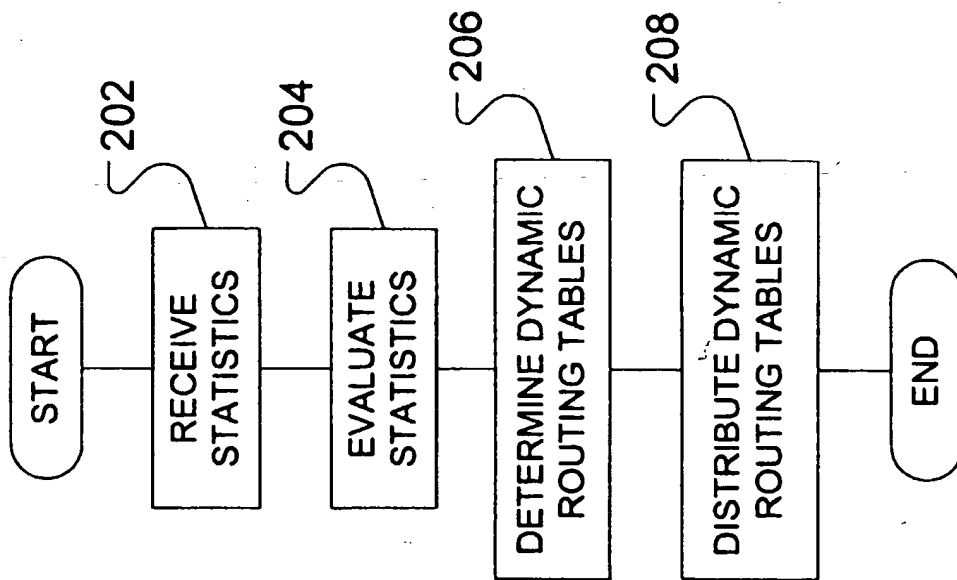


FIG. 2